

# Notice of Allowability

Application No.

09/559,204

Examiner

James H. Blackwell

Applicant(s)

REGAN, DAVID

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-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address--

All claims being allowable, PROSECUTION ON THE MERITS IS (OR REMAINS) CLOSED in this application. If not included herewith (or previously mailed), a Notice of Allowance (PTOL-85) or other appropriate communication will be mailed in due course. **THIS NOTICE OF ALLOWABILITY IS NOT A GRANT OF PATENT RIGHTS.** This application is subject to withdrawal from issue at the initiative of the Office or upon petition by the applicant. See 37 CFR 1.313 and MPEP 1308.

1. ☒ This communication is responsive to RCE filed 01/23/2006.
2. ☒ The allowed claim(s) is/are 1-15.
3. ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
  - a) ☐ All    b) ☐ Some\*    c) ☐ None    of the:
    1. ☐ Certified copies of the priority documents have been received.
    2. ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
    3. ☐ Copies of the certified copies of the priority documents have been received in this national stage application from the International Bureau (PCT Rule 17.2(a)).

\* Certified copies not received: \_\_\_\_\_.

Applicant has THREE MONTHS FROM THE "MAILING DATE" of this communication to file a reply complying with the requirements noted below. Failure to timely comply will result in ABANDONMENT of this application.  
**THIS THREE-MONTH PERIOD IS NOT EXTENDABLE.**

4. ☐ A SUBSTITUTE OATH OR DECLARATION must be submitted. Note the attached EXAMINER'S AMENDMENT or NOTICE OF INFORMAL PATENT APPLICATION (PTO-152) which gives reason(s) why the oath or declaration is deficient.
5. ☐ CORRECTED DRAWINGS ( as "replacement sheets") must be submitted.
  - (a) ☐ including changes required by the Notice of Draftsperson's Patent Drawing Review ( PTO-948) attached
    - 1) ☐ hereto or 2) ☐ to Paper No./Mail Date \_\_\_\_\_.
  - (b) ☐ including changes required by the attached Examiner's Amendment / Comment or in the Office action of Paper No./Mail Date \_\_\_\_\_.

Identifying indicia such as the application number (see 37 CFR 1.84(c)) should be written on the drawings in the front (not the back) of each sheet. Replacement sheet(s) should be labeled as such in the header according to 37 CFR 1.121(d).
6. ☐ DEPOSIT OF and/or INFORMATION about the deposit of BIOLOGICAL MATERIAL must be submitted. Note the attached Examiner's comment regarding REQUIREMENT FOR THE DEPOSIT OF BIOLOGICAL MATERIAL.

## Attachment(s)

1. ☒ Notice of References Cited (PTO-892)
2. ☐ Notice of Draftperson's Patent Drawing Review (PTO-948)
3. ☒ Information Disclosure Statements (PTO-1449 or PTO/SB/08),  
Paper No./Mail Date 01/23/06
4. ☐ Examiner's Comment Regarding Requirement for Deposit  
of Biological Material
5. ☐ Notice of Informal Patent Application (PTO-152)
6. ☐ Interview Summary (PTO-413),  
Paper No./Mail Date \_\_\_\_\_
7. ☐ Examiner's Amendment/Comment
8. ☒ Examiner's Statement of Reasons for Allowance
9. ☐ Other \_\_\_\_\_

*William L. Bashore*  
**WILLIAM BASHORE**  
**PRIMARY EXAMINER**  
*4/2/2006*

### DETAILED ACTION

1. This Office Action is in response to an RCE filed 01/23/2006.
2. The following is an examiner's statement of reasons for allowance: The prior art of record fails to teach, suggest, or render obvious, *A method for providing a network-based tax service database interface comprising the steps of: (a) accessing tax-related forms in a governmentally maintained forms database, wherein the tax-related forms include a plurality of fields; (b) accessing a revenue services database, wherein the revenue services database stores tax return data in duplicate, in a first table on the revenue services database and in a second table on the revenue services database; (c) extracting a portion of the tax return data from the revenue services database, such that the extracted tax return data is provided to a legacy processing system from the first table and the extracted tax return data is provided to a corporate information database from the second table independently from the extracted tax return data from the first table; (d) completing at least one of the tax-related forms, wherein a first set of fields from the plurality of fields are filled based on the tax return data, wherein the tax return data on which field filling is based is extracted from both the legacy processing system and a succeeding processing system, wherein a second set of fields from the plurality of fields is populated with results from calculations based on data entered into a first set of fields, and wherein the revenue services database mirrors data tables on the succeeding processing system; (e) submitting the tax-related forms to a governmental entity, wherein the tax-related forms are formatted based on rules associated with the governmental entity; (f) sending updates to the tax-related forms to a processor utilizing*

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*a network for processing and subsequent use; and (g) displaying an activities interface to the user, wherein the activities interface identifies activities for users to complete, and governs the data collection process for completing the identified activities.*

3. The most closely related prior art attributed to Miller (U.S. Patent No. 6,202,052) in view of Hunkins et al. (hereinafter Hunkins, U.S. Patent No. 5,970,501) and in further view of TurboTax (TurboTax User's Guide, Version 95.0 tax Year 1995, Intuit) fails to teach *(b) a revenue services database, wherein the revenue services database stores tax return data in duplicate, in a first table on the revenue services database and in a second table on the revenue services database and (c) extracting a portion of the tax return data from the revenue services database, such that the extracted tax return data is provided to a legacy processing system from the first table and the extracted tax return data is provided to a corporate information database from the second table independently from the extracted tax return data from the first table.* Prior art of record fails to teach storage into, or use of duplicate tables within a single revenue services database for the purpose of making available identical tax information to a legacy processing system from one table while making available identical tax information to a corporate information database from a second table, while both databases are independent of one another and belonging to separate, independent, and unrelated organizations.

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4. Any comments considered necessary by applicant must be submitted no later than the payment of the issue fee and, to avoid processing delays, should preferably accompany the issue fee. Such submissions should be clearly labeled "Comments on Statement of Reasons for Allowance."

### ***Conclusion***

5. Any inquiry concerning this communication or earlier communications from the examiner should be directed to James H. Blackwell whose telephone number is 571-272-4089. The examiner can normally be reached on Mon-Fri.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Heather R. Herndon can be reached on 571-272-4136. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

6. Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free).

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James H. Blackwell

03/31/2006

*William S. Bashore*  
**WILLIAM BASHORE**  
**PRIMARY EXAMINER**  
*4/2/2006*